



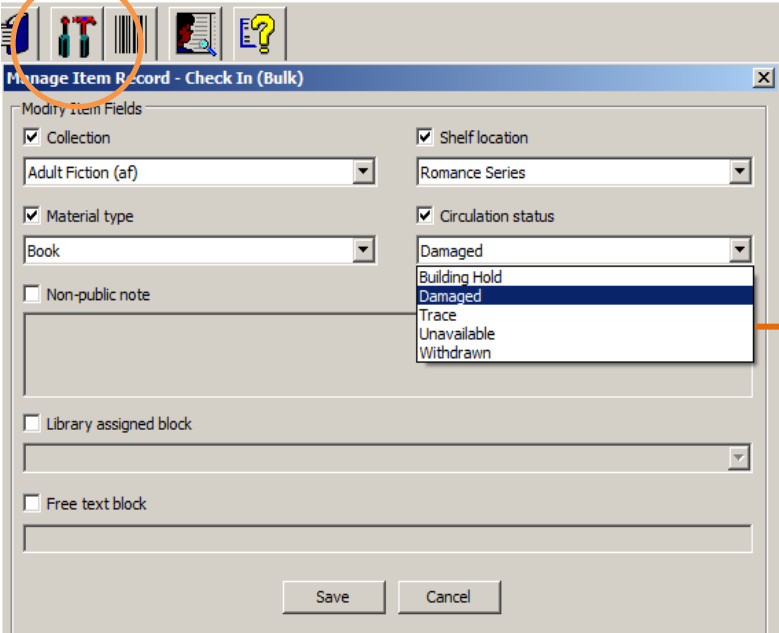
Welcome to Polaris CIO2!

Tips & F-YI:

- Time stamp for check in can be found at the bottom of the item record status
- Save the former barcode when issuing a replacement card
- No restricted Adult – for adults who are under a guardian and need a restricted card, use the restricted juvenile child card.
- You can copy & paste the patron's barcode from CircIT to Polaris
- Alt + tab allows you to toggle between screens

Manage Item Record

Hammer Time!
Use the tool icon to access the **Manage Item Record**

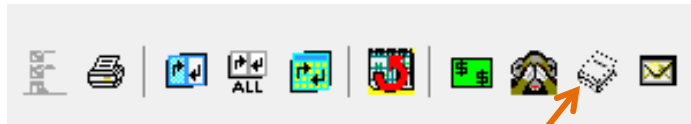


Circulation Status ~

- Damaged
- Trace
- Withdrawn

Remember: If the item is not checked in – you can't check out!

Lost Items:



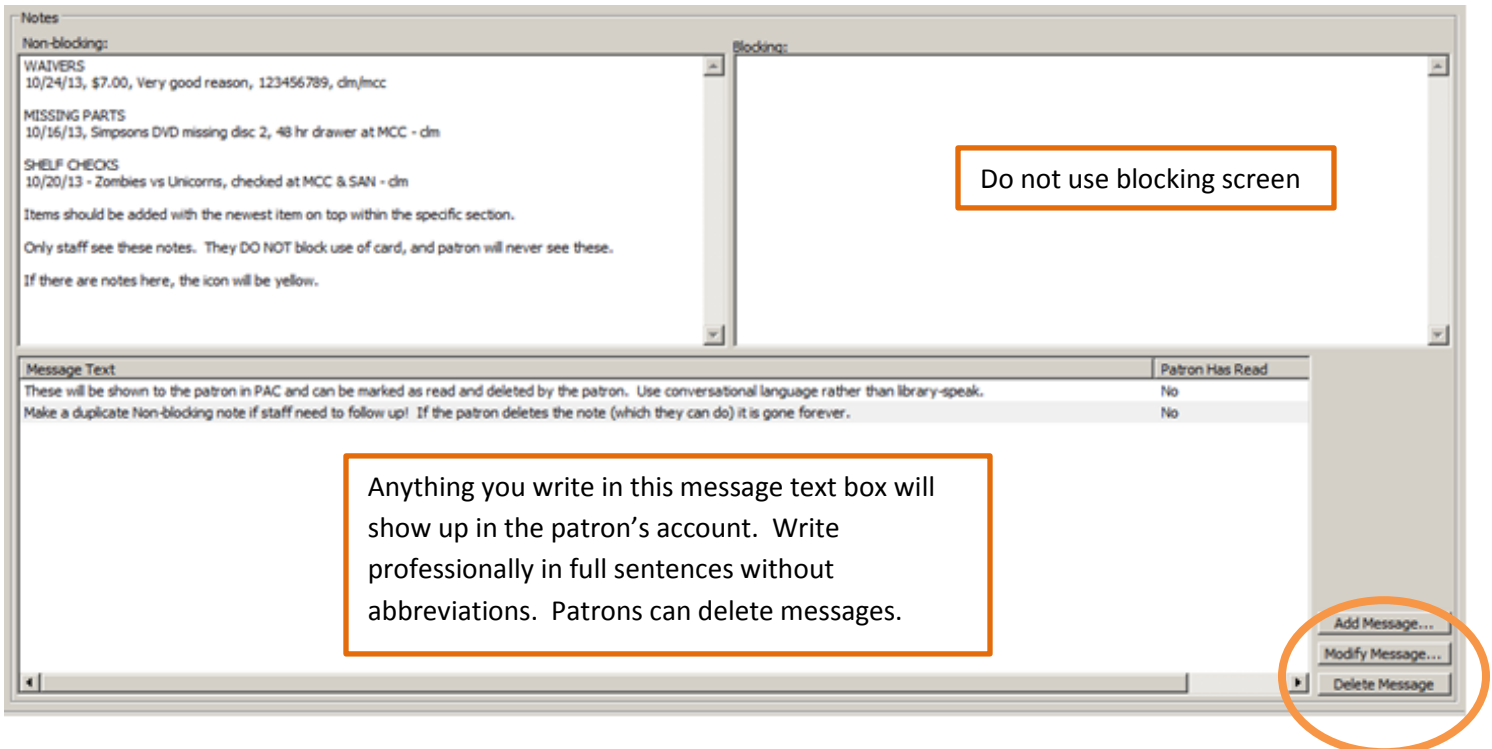
Select the item in the all items out screen under patron status

Notes

Non-blocking – Notes that require staff action such as missing parts or history information such as waivers, do not block patrons from using their card.

Blocking – Notes that will block patron's ability to use their card. Don't use this.

Message to Patron – Note that is visible to the patron in their account on the PAC, can be marked as read and deleted by the patron, if items need to be kept from here than they should be duplicated in the non-blocking note area.



The screenshot shows a software interface for managing notes. It has two main sections: 'Non-blocking:' and 'Blocking:'. The 'Non-blocking:' section contains text about waivers, missing parts, and shelf checks. The 'Blocking:' section is empty. Below these is a 'Message Text' box with instructions. At the bottom right, there are three buttons: 'Add Message...', 'Modify Message...', and 'Delete Message...'. An orange box highlights the 'Do not use blocking screen' text in the 'Blocking:' section. Another orange box highlights the 'Message Text' box with the text: 'Anything you write in this message text box will show up in the patron's account. Write professionally in full sentences without abbreviations. Patrons can delete messages.' A third orange box highlights the 'Add Message...', 'Modify Message...', and 'Delete Message...' buttons.

Notes

Non-blocking:

WAIVERS
10/24/13, \$7.00, Very good reason, 123456789, dm/mcc

MISSING PARTS
10/16/13, Simpsons DVD missing disc 2, 48 hr drawer at MCC - dm

SHELF CHECKS
10/20/13 - Zombies vs Unicorns, checked at MCC & SAN - dm

Items should be added with the newest item on top within the specific section.

Only staff see these notes. They DO NOT block use of card, and patron will never see these.

If there are notes here, the icon will be yellow.

Blocking:

Do not use blocking screen

Message Text

These will be shown to the patron in PAC and can be marked as read and deleted by the patron. Use conversational language rather than library-speak. Make a duplicate Non-blocking note if staff need to follow up! If the patron deletes the note (which they can do) it is gone forever.

Patron Has Read

No

No

Anything you write in this message text box will show up in the patron's account. Write professionally in full sentences without abbreviations. Patrons can delete messages.

Add Message...
Modify Message...
Delete Message...

Click in the non-blocking box and type in the information using the formats below:

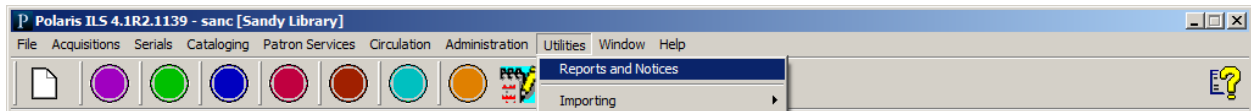
Note Formats

- Waivers:
date, amount, reason, ticket number, branch, initials
- Missing Parts:
date, reason (Friends DVD missing disc 2), on 48 hrs. shelf at "Branch", initials
- Shelf Check:
date, item, looked for, where, initials
- Lost Library Card
date, card was left at branch, we will keep it for 30 days, initials
date, after 30 days card was destroyed, initials

**ALWAYS DATE
YOUR NOTES**

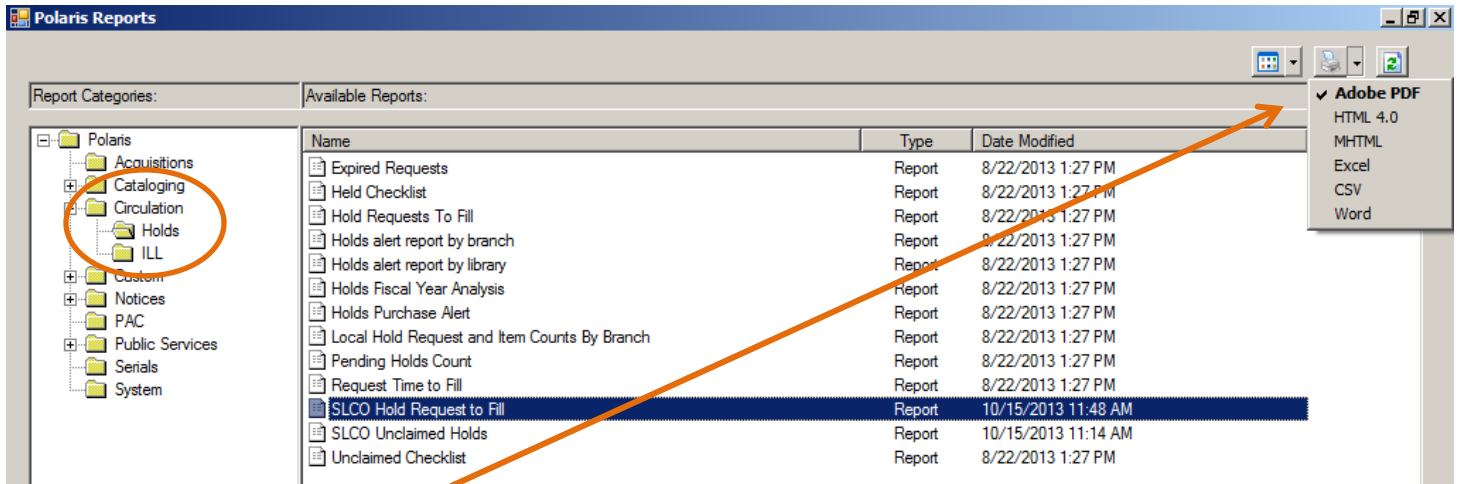
Holds Request List

Select Utilities from the drop down menu on the Polaris bar then click on Reports and Notices:



Alternately, use the click on the  and  to open Reports and Notices.

1. In Polaris Reports select Circulation, then Holds and SLCO Hold Request to Fill
2. Select branch and sort order using the options in the pop up dialog box. Then click submit or press enter.



3. Option: excel or PDF — Excel will give you additional sort options.

Top 5 Polaris Tips

1. Start in Check-Out
2. Right Click on things ("Links" has great stuff)
3. Ctrl + Alt + F9— Item Record Search
4. Ctrl + Shift + A—"Karate Chop" to get full results
5. No seriously, start in Check-Out

Practice Scenarios – Work through the following before you leave today

1. Treat one of the items on your list as an ILL. Check it out to yourself or the new card you created with a due date longer than the normal 3 weeks.

2. One of the DVDs or CDs on your list was returned on the sorter missing a disc. Find the last patron, check the item back out to them, and make a note for the missing part.

3. Patron: Do you have the newest John Grisham book? (hint: books that are really, really new may have the date as III)

4. Run a Holds Request List for your home branch.
 - a. Export the Unclaimed Holds list to Excel

5. Oh No! It has been 48 hrs and the disc from scenario #2 has not be returned! Look up the patron, and set the item to lost.